

TIPS FOR OBTAINING MEDICAL DOCUMENTATION

Retrieving Medical Documentation of Disability: Helpful Tips for Case Managers

Evaluation Specialists maintain the responsibility of securing Other Health Impaired (OHI) documentation as a part of the evaluation process. Refer to the below tips when obtaining OHI documentation from physicians.

- Fax the Release of Information form (properly completed) along with the blank Eligibility Form. Incomplete forms will result in delays. Follow up with the physician's office to make sure the eligibility form was received.
- Allow the physician's office 7-10 working days to complete the form. Don't wait until a deadline is looming to attempt to obtain paperwork. After that, make follow-up calls at least weekly. Communication tips to consider are:
 - Stress the importance of completing and submitting paperwork.
 - Ask if there is something you can do to facilitate the process.
 - Be patient, but persistent.
 - Always thank office staff members for their assistance.
- If the office staff members continue to be unresponsive, ask the parent to call the doctor and/or take the Documentation of Disability form to the doctor's office. Sometimes, the physician will respond more quickly to the parent if the form is brought to an appointment.
- After the diagnostician receives the completed Documentation of Disability, make sure that at the top of the page, the "Yes" box is checked. If the "No" box is checked, call the doctor's office to verify that they understand that by checking "No" on the Documentation of Disability, they are saying that the medical condition DOES NOT



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adversely affect the student in the educational setting and this DISQUALIFIES the student for that particular disability label.

- If you can't read the handwriting, contact the physician's office to help you understand what was written.
- Ensure the diagnosis states the specific condition that is a barrier to the student accessing the general education curriculum/environment.
- If the specialist physician will not complete the Documentation of Disability within a reasonable time, ask the student's pediatrician to complete the form.
 - Note: This may or may not work. The pediatrician is probably aware of the condition and is most likely the person who referred the student to the specialist in the first place.
- Make sure the doctor signing the Documentation of Disability is NOT a Psychologist, Nurse Practitioner, or Physician's Assistant. ONLY a licensed physician can complete the Documentation of Disability form. Call the office and ask that the form be co-signed by a physician if you receive a Documentation of Disability form signed by a Psychologist, Nurse Practitioner, or Physician's Assistant.
- When a physician writes a diagnosis for an extremely sensitive condition (e.g., HIV):
 - Return the Documentation of Disability Form to the doctor for revision of the wording.
 - It is recommended that the diagnosis should be OHI and only a description of the symptoms that create barriers in the educational setting should be listed on the Documentation of Disability.
 - This confidential information should not be in the student's state folder.
 - The confidential diagnosis should be forwarded to the school nurse who will alert Health and Medical Services.
 - This sensitive information will be communicated on a "need to know only" basis.



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- Ask the school nurse to co-sign the Documentation of Disability. This will allow the nurse to be aware of any medical conditions on the campus even if the student doesn't receive any services from the nurse during the school day.

